

## CLAIMS

What is claimed is:

1. A method for formulating a stock Portfolio comprising the steps of :
  - establishing a database of a multiplicity of stocks;
  - applying preset parameters for filtering said stocks to form an Autoportfolio of selected stocks;
  - weighting each of said preset parameters that are applied to each of said selected stocks for generating a Rating for each stock of said Autoportfolio;
  - applying said weighted parameters including said Rating to said stocks of said Autoportfolio for establishing limits for issuing a BUY order for a selected stock when the preset parameters for purchase are met;
  - purchasing a predetermined number of the selected stocks which meet the preset parameters to establish a Portfolio;
  - setting a limit, related to said limits for issuing a BUY order, for selling a purchased stock from said Portfolio and for issuing a SELL order when said limit for selling is met; and
  - selling said purchased stock from said Portfolio and purchasing another stock which meets said preset parameters.
2. A method as in Claim 1, wherein said step of establishing a database includes

1 obtaining said database on a daily basis .  
2  
3

4 3. A method as in Claim 1, wherein the step of weighting employs the  
5  
6 parameters of (S1) earnings growth rate past 3 years; (S2) earnings growth rate  
7  
8 current year; (S3) earnings growth rate estimate next year; (S4) earnings growth last  
9  
10 quarter compared to same quarter 1 year ago; (S5) P/E, estimated; (S6) P/E Growth,  
11  
12 current; (S7) P/E Growth, estimated; (S8) sales growth past 12 months; (S9)  
13  
14 difference between sales growth rate from the previous 3 years to the last year;  
15  
16 (S10) price momentum; (S11) capitalization; (S12) debt; (S13) dividend; and (S14)  
17  
18 Rating.

19  
20  
21 4. A system for formulating a stock Portfolio comprising :  
22  
23 a database of a multiplicity of stocks;  
24  
25 means for applying preset parameters to filter said stocks, thereby forming  
26  
27 an Autoportfolio of selected stocks;  
28  
29 means for weighting each of said preset parameters that are applied to each of  
30  
31 said selected stocks for generating a Rating for each stock of said Autoportfolio;  
32  
33 means for applying said weighted parameters including said Rating to said  
34  
35 stocks of said Autoportfolio for establishing limits for issuing a BUY order for a  
36  
37 selected stock when the preset parameters for purchase are met;  
38  
39 means for purchasing a predetermined number of the selected stocks which

1 meet the preset parameters to establish a Portfolio;

2  
3 means for setting a limit, related to said limits for issuing a BUY order, for  
4  
5 selling a purchased stock from said Portfolio and for issuing a SELL order when  
6  
7 said limit for selling is met; and

8  
9 means for selling said purchased stock from said Portfolio and purchasing  
10  
11 another stock which meets said preset parameters.

12  
13  
14  
15 5. A system as in Claim 4, wherein said means for applying preset parameters  
16  
17 comprises selected ones of the parameters of S1) earnings growth rate past 3 years;  
18  
19 (S2) earnings growth rate current year; (S3) earnings growth rate estimate next year;  
20  
21 (S4) earnings growth last quarter compared to same quarter 1 year ago; (S5) P/E,  
22  
23 estimated; (S6) P/E Growth, current; (S7) P/E Growth, estimated; (S8) sales growth  
24  
25 past 12 months; (S9) difference between sales growth rate from the previous 3 years  
26  
27 to the last year; (S10) price momentum; (S11) capitalization; (S12) debt; (S13)  
28  
29 dividend; and (S14) Rating.